

Billing Coordinator Training Plan

Packet includes: 30/60/90 game plan, positions checklist & scorecard

Job Description: Provide a high focus on collecting and billing patients including insurance companies and strive for a low A/R and high practice cash flow.

Goal: Become fully trained as a billing coordinator, mastering all duties and tasks assigned within 90 days post-employment start date and during the duration of employment.

Billing Coordinator Checklist- 30/60/90 Day Plan to Be Proficient In

1. Overall Office Duties
2. Patient INS information updated & verified
3. Monitor payment plans & OTC collections
4. Submit claims, post payments daily & complete correspondence
5. Schedule Prep
6. Run all necessary reports, follow proper cadence

What each task includes:

- Overall Office Duties
 - Lock doors
 - Clock in and out
 - Turn lights, TV's, etc. off
 - Tidy reception and waiting areas
 - Turn checklist in to manager
- Patient INS information updated & verified
 - Update all insurance information
 - Verify patient insurance coverage
 - 1x/year with full breakdown on every patient
 - Update patient accounts
 - Primary insurance company contact
- Monitor payment plans & OTC collections
 - Monitor patient collections- goal is 98% collections daily
 - Follow-up with any unpaid treatment
 - Monitor all payment plans offered
 - Run credit card payment plans set up with patients
 - Aim for running only on the 1st and the 15th of every month
- Submit claims, post payments daily & complete correspondence
 - Post payments daily - over the counter, insurance and mail
 - Ensures that the deposit record matches the payment received amount.
 - Submit insurance claims, pre-estimates, secondary insurance, and appeals with appropriate x-rays and narratives
 - Maintain 97-98% collections
 - Maintain collection control; letter sequence, collection calls, financial agreement follow-up.
 - Audit accounts
 - Remove bad debt monthly, with Doctor's approval
 - Follow up on any claims that are over 30 days old
- Schedule Prep
 - Review next day's patients for:
 - Balances due
 - Credits on accounts
 - X-rays needed for insurance based on TX being rendered
 - Have all of this ready for morning huddle
- Run all necessary reports, follow proper cadence

- Patient credits, send out as needed
 - Or call patients to schedule treatment with the credits on their account
- Daysheet detailing previous day's production and collections
 - Given to Doctor to review for:
 - Adjustments
 - All procedures billed out properly
 - Confirm any refunds
- Run patient aging, gain collections report
 - Report these numbers weekly to doctor
- Run insurance aging report for claims unpaid, gain collections
 - Report these numbers weekly to doctor
- Print the insurance audit report and follow up with insurance companies
- Review monthly statements with financial coordinator
 - Generate and send monthly statements by the 5th of every month
 - Turn over bad accounts to collection agency
- Run month end for all accounts
- Report totals for month end reported to doctor:
 - Production totals
 - Collection totals
- Aging for insurance and patient
 - What it was at the beginning of the month and where it ended
- All accounts sent to collections
- All bad debt written off
- Outstanding insurance claims
- Claims not sent
- Total number:
 - Active patients
 - NPs and where they came from
 - Attrition of lost patients

Weekly

- Run patient aging, gain collections report
 - Report these numbers weekly to doctor
- Run insurance aging report for claims unpaid, gain collections
 - Report these numbers weekly to doctor

Monthly

- Maintain collection control; letter sequence, collection calls, financial agreement follow-up.
- Audit accounts
- Remove bad debt monthly, with Doctor's approval
- Follow up on any claims that are over 30 days old
- Print the insurance audit report and follow up with insurance companies
- Review monthly statements with financial coordinator
- Generate and send monthly statements by the 5th of every month
- Turn over bad accounts to collection agency
- Run month end for all accounts
- Report totals for month end reported to doctor:
 - Production totals
 - Collection totals
 - Aging for insurance and patient
 - What it was at the beginning of the month and where it ended
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Billing Coordinator Scorecard

30 Day Goals

Date for review:

Rate the following statements – 1 being strongly disagree, 5 being strongly agree

Clock in/out

1 2 3 4 5

Scan EOBs

1 2 3 4 5

Enter all checks and payments received in mail daily

1 2 3 4 5

Review schedule two days out for patient insurance/frequencies/out-of-network

1 2 3 4 5

Review schedule to ensure all procedures were billed out correctly and posted to correct provider

1 2 3 4 5

Balance out the day

1 2 3 4 5

Run End of Day reporting

1 2 3 4 5

Run Patient Aging Report

1 2 3 4 5

Run Insurance Aging Report

1 2 3 4 5

Prepped for the morning huddle with patient alerts ready for next day and given to check in coordinator.

1 2 3 4 5

Report number for claims, outstanding A/R, & claims unsent

1 2 3 4 5

Areas I feel I excel:

Areas I feel I need extra help on:

Goal for next 30 days:

60 Day Goals

Date for review:

Rate the following statements – 1 being strongly disagree, 5 being strongly agree

Complete all 30 day tasks with no supervision

1 2 3 4 5

Send statements and call on due balances

1 2 3 4 5

Make collection calls

1 2 3 4 5

Notify patients whose insurance company has not paid in 45 days so that they can begin to pay per their agreement

1 2 3 4 5

Ensure that the deposit record matches the payment received amount

1 2 3 4 5

Send out secondary claims as needed

1 2 3 4 5

Submit all insurance claims

1 2 3 4 5

Areas I feel I excel:

Areas I feel I need extra help on:

Goal for next 30 days:

90 Day Goals

Date for review:

Rate the following statements – 1 being strongly disagree, 5 being strongly agree

Complete all 30 and 60 day tasks with no supervision

1 2 3 4 5

Ensure that office is at 95-98% collection percentage always

1 2 3 4 5

Upon approval of the doctor, the patient's balance on a 90-day and older delinquency will be adjusted off the account as a bad debt and entered onto the "collection ledger"

1 2 3 4 5

Review all accounts with credits and refunds needed

1 2 3 4 5

Credential doctors and hygienists

1 2 3 4 5

Negotiate fee schedules

1 2 3 4 5

Update fee schedules in January of each year

1 2 3 4 5

Areas I feel I excel:

Areas I feel I need extra help on:

Goal for next 30 days:
